



State of Montana Project Management Office

Project Ideation Phase

Opportunity Screening Worksheet Document Instructions

The Opportunity Screening Worksheet helps the management team evaluate a new project idea and determine if development is warranted. The worksheet analyzes potential risks and return on investment. With minor modifications, the worksheet can be used for a benefits analysis, further helping to determine project value.

The worksheet helps analyze the need of a specific idea in relation to the organization's capabilities, potential risks, and return on our investment, etc. The worksheet can also be modified for a benefits analysis on endeavors other than development projects.

Resources in every organization are expensive and sometimes rare. Furthermore, finances, personnel and time are valuable commodities needed for qualified projects with the highest return on investment. Reviewing a project for stakeholder benefit is always a good exercise; in some organizations, it is a requirement.

The accompanying worksheet is a working document. The various questions should be filled out by a team, group or special committee investigating a new idea or product for your organization's business decision makers. Answering each question and rating certain categories will provide the type of information needed by the management team to determine the project. At the end of the worksheet is a table to help summarize the project scores.

The Opportunity Screening Worksheet uses a grading system of 1 through 10 for "Weight," which is a judgment of importance and value, and "Fulfills" that is a judgment of requirements met. Used in a context of other projects, you can evaluate how a project and its value compare to other projects that may be using the same limited resource pool of money and personnel.

Administrative Information

Revision	Author	Date	Sections Affected	Change Summary
1.0		1/2/2009		

Current Version	1.0
Date	1/2/2009
Master Document Chapter Number	2
Document ID	40